Employee

Introduction

Introduction

1. Employee Master window is used to maintain the employee details.

2. The Employee master is used to maintain the all data about the employees , It includes User details, Location Details, Personal Details, Bank Account Details.

Tab

Employee

Critical Fields :

1. Search Key : Used to maintain the employee code and unique id number.(Use characters and numbers)

2. Group : We can mention the Employee Group(Group is an another master window) (Do not change the Group after the transactions)

3. Name : We can create Employee Name.(Ex : Ranjith Pvt.Ltd)

Critical & onetime setup fields :

Non-Critical Fields :

1. Operator Check Box : When we select this check box this Employee Name will shown in Production queue.

2. Sales Representative : We can use the Employee as a Sales Representative when select this check box.

3. Payment Term : We can select payment term from the payment term master.

4. Payment Rule : This is used to select the payment type.(Ex : Cash, Check , On Credit)

5. Price List : We can select the Price list type from the price list master.(Ex : Purchase, Sales)

6. Delivery Rule : We can select the delivery rule from the list.(After Receipt , Availability, Manual)

7. Delivery Via : We can select the Delivery Type from the list .(Pick Up, Shipper, Delivery)

Zoom condition's :

1. We can find the transactions by using this Employee.(EX : Purchase Order,Material Receipt,Salas Order,Salary Structure, Leave Status, Loans and Advances, etc..)

Customization :

Contact (User)

Critical Fields

1. Name : We should maintain the contact user name for that employee. (Ex : Name)
2. Birthday : It is used to maintain the Birthday Date.(Ex : 06/04/2019)

Critical & onetime setup fields

Non-Critical Fields

1. Email Address : It is used to maintain the Email Id for this user.(Ex : Name1@gmail.com)
2. Email User Password : This is used to maintain the Password for the mail ID.
3. Partner Location : Used to maintain the Partner location. (To create location refer location Master)
4. Supervisor : This field is used to maintain the supervisor of the particular Employee.(This name is also created in Employee window)

5. Phone : Used to maintain the user contact Number.

Zoom condition's

1. We can check the transactions by using this contact user.(Ex : Purchase Order,Sales Order,Material Receipt,Invoices,.)

Validation

1. Save : Used to Save the Record.
2. Delete : Used To Delete the Saved Records.

Location

Critical Fields

1. Name : This Field is used maintain the location Name.(Ex : Location 1)

Critical & onetime setup fields

Non-Critical Fields

1. Country : We can select the country name from the list.(Ex : India)
2. State : We can select the state name from the list .(Ex : Tamil Nadu)
3. City : We can select the city name from the list.(Ex : Coimbatore)
4. Address Fields : Used to maintain the address of the location.
5. Postal Code : Used to give postal number.

Zoom condition's

1. We can zoom and check the transactions by using this partner locations.(Ex : Invoice,Subcontract Receipt,..)

Validation

1. Save : Used to save the record.
2. Delete : Used to delete the existing record .

Tab

Bank Account

Critical Fields

1. Bank : We should select the bank name from the bank master.(Ex : State Bank)

Critical & onetime setup fields

Non-Critical Fields

1. User/Contact : We select the user contact name from the contact user tab.(Ex : Name 1)
2. Account No : Used to maintain the Bank Account Number.
3. Bank Account Type : Used to select the Account type like Card,Cash,Checking,Current Account,Fixed Deposit ,OD,Recurring Deposit Account,Salary Account, Savings.
4. Account Usage : Used to maintain the usage like Direct Debit,Direct Deposit,Both,None.

Zoom condition's

Validation

1. Save : Used To Save the record .
2. Delete : Used to Delete the Existing record .

Personal Information

Critical Fields

1. Date of Joining : It is used to maintain the joining date of this particular Employee.

Critical & onetime setup fields

Non-Critical Fields

1. Blood Group : Used to mention the Blood Group of the Employee.(Ex : A+,B+,AB+,O-,..)
2. Gender : Used to mention the Gender (Ex : Male,Female,TransGender).
3. Marital Status : Used To mention their marital status(Ex : Single,Married,Divorced,Widowed)
4. Department : Used to maintain the Employee working department.(Ex : Accounts, Refer

Department Master)

5. Position : Used to maintain the Employee Position in that particular department (Ex : Accountant, Refer Position Master)

6. Wedding Date : Used To mention their Wedding date (While choosing martial status as Married wedding date popup will appear)

7. Father Name : Used to mention the Fathers's name

8. Mother Name : Used to mention the Mother's Name

9. Spouse Name : Used to mention the Wife or Husband Name.

10. Languages Known : Used to maintain the language known details

11. UAN Number : Used to Maintain the PF UAN Number

12. Aadharcard Number : Used Maintain the Employee Aadharcard Number.

13. PF Number : used to maintain the PF Number

14. ESI : Used to maintain the ESI Number

15. Pancard Number : Used to maintain the Pancard Number to the employee

16. Driving License : Used to maintain the employee driving license number

17. Passport Number : Used to maintain the Passport number

18. Probation Period : This Date field is used to give the probation date

19. Date Of Relieving : Field is used to mention the Relieving Date

20. Date Confirm : Used to maintain the employee confirmation date

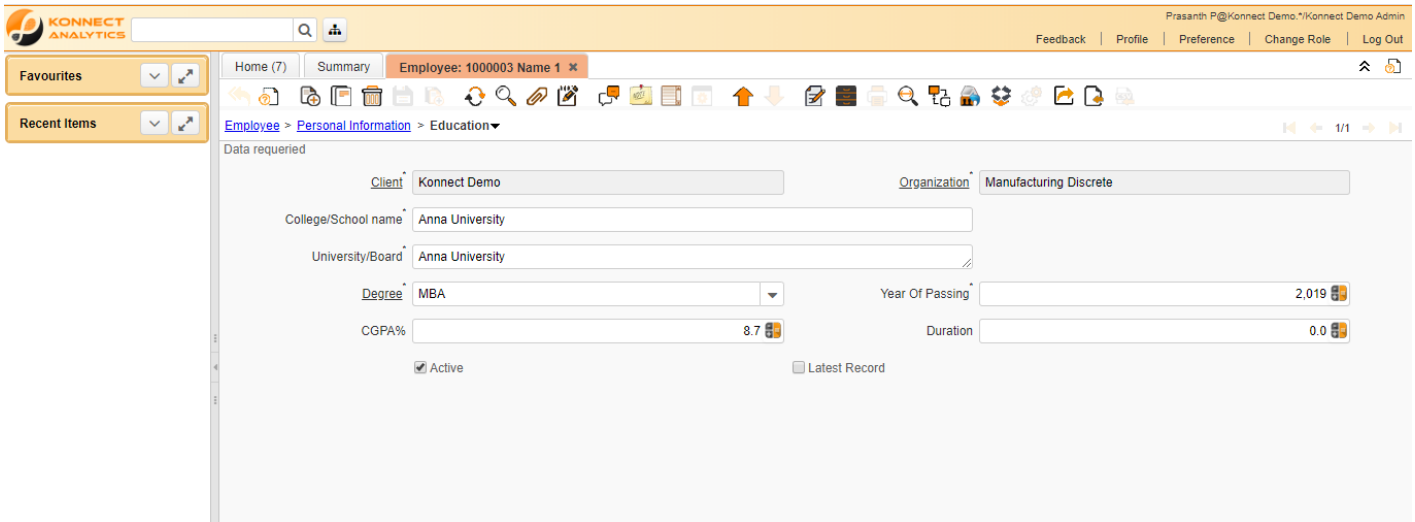21. Complete Plan : Used to maintain the plan completion date.

Zoom condition's

Validation

1. Save : used to save the record.
2. Delete : used to delete the records.

Education

Critical Fields

1. College/School Name: Used to mention the college name . (Ex : Anna University)
2. University/Board : Used to mention the University name .(Ex : Anna University)
3. Degree : Used to mention the Degree.(Ex : MBA , Refer Degree Master Window)

Critical & onetime setup fields

Non-Critical Fields

1. Year Of Passing : Used To mention the passed out year.
2. CGPA % : Used to mention the Percentage.

Zoom condition's

Validation

1. Save : Used to save the record
2. Delete : Used to delete the record.

Experience

Critical Fields

1. Employer Name : Used to maintain the previous Employer Name of the Employee.
2. Reason For Leaving : Used To mention the Relieving Reasons.
3. From Date : Employee Joining date in that Company.
4. To Date: Employee Relieving Date from that company.

Critical & onetime setup fields

Non-Critical Fields

1. Designation : Used to mention Employee Designation in that previous company.
2. Gross Salary : Used to mention Previous Salary of the Employee.

Zoom condition's

Validation

1. Save : Used to save the document
2. Delete : Used to delete the Records.

Training

Critical Fields

1. Institution Name : We Can fill the Training Institution name.
2. From Date : Training Starting date.
3. To Date : Training End date.

Critical & onetime setup fields

Non-Critical Fields

Zoom condition's

Validation

Validation

Validations

Save :

Used to save the document.

Delete :

Used to delete the records.

Video